

## Checklist for completing the Financial Declaration

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- You must complete a form before you file it. These instructions will help you complete the forms.
- The judicial services representative cannot complete a form for you.
  - Attach a copy of any document referred to in the form.
    - Keep a copy of all documents for your records.
      - Attend all court hearings.
  - Some forms may not apply in your case.

### (1) Notice of URCP 26.1 Disclosure and Discovery Requirements in Domestic Relations Actions

- Print your name and contact information at the top of the first page. Check whether you are the Petitioner or Respondent or the attorney for the Petitioner or Respondent.
- Print the judicial district number, the county name and the court address on the blank lines. Complete the heading exactly as it appears in the petition.
- Date and sign the form.
- Serve the form with the petition on the other party and file proof of service with the court. [URCP 4](#) governs service of the petition.

### (2) Financial Declaration

- Print your name and contact information at the top of the first page. Check whether you are the Petitioner or Respondent.
- Print the judicial district number, the county name and the court address in the blank lines.
- Complete the heading exactly as it appears in the petition in your case.
- Paragraph (1): Print the last four digits only of your Social Security Number.
- Paragraph (2)(A): Print your occupation or type of employment.
- Paragraph (2)(B): Check the correct box to show whether you are employed. If you are employed, complete the information about your employer. If you have more than one employer, complete the information for each employer.
- Paragraph (3): Print the gross monthly amount you receive under each source of income that applies to you. Gross income means the amount you are paid before any deductions are taken from your pay. For income amounts that change from month to month, calculate the annual total and divide by 12 months to list a

monthly amount. List any alimony or child support payments you receive from a prior court order not related to this case. Leave blank any items that do not apply to you. Use the "other" line to disclose sources of income that are not listed and describe briefly that type of income. Add the amounts and print your total gross monthly income. Attach the required documents proving income. If you have no income, check the box and explain why you have no income.

- Paragraph (4): Print the amount of your monthly tax deductions according to the type of deduction. These are deductions required by law and which you do not make voluntarily. There may be other funds withheld automatically from your paycheck that you will report in Paragraph (11), Monthly Expenses. Add the amounts and print your total monthly deductions. Attach the required documents proving monthly tax deductions.
- Paragraph (5): Print the total gross monthly income amount listed in Paragraph (3) and the total monthly tax deductions amount listed in Paragraph (4). Then subtract the amount in Paragraph (4) from the amount in Paragraph (3) Print the answer under "Net Income."
- Paragraph (6): Complete this paragraph if you own real property (for example, a house or land). In section (A) print the address of the house you own, the date you bought it, whose name(s) are on the title, the amount you paid for the house, and the current value of the house. If you and the other party jointly own the property, then check the boxes for both "petitioner" and "respondent." If there are mortgages, you must list them, the amount owed to the mortgagor, and the amount of monthly payments you make on the mortgage. If there are two or more mortgages or loans, list all of them. Attach supporting documents like copies of mortgage statements, mortgage or loan documents, deeds of title, and what you used to determine the current value of the house or property (for example, a copy of the most recent tax assessment or appraisal). In section (B), provide the same information and supporting documents for any other real property that you own. Attach more pages if you own additional real property.
- Paragraph (7): Complete this paragraph if you own motor vehicles including cars, trucks, motorcycles, boats, trailers, or major equipment like a tractor. If there are loans, list them. Also print the name and address of any lender who holds a lien on the property. If there are no loans or liens on the property item, then leave the "Lien Holder" section blank. Check whose name(s) are on the title. If you and the other party jointly own the property, then check the boxes for both "petitioner" and "respondent." Print the current value, any amount you owe on a loan, and the monthly payments on the loan. Attach supporting documents like loan documents, payment statements, titles, and the basis for the current value you list (for example, information from the Kelley Bluebook website, [www.kbb.com](http://www.kbb.com), or the NADA website, [www.nada.com](http://www.nada.com)).

- Paragraph (8): Complete this paragraph if you own or partially own any business interest. Print the business name, address, description of the business, and the percentage of the business that you own. Also list the current value of the business. Attach any supporting documents.
- Paragraph (9): Complete this paragraph if you own any financial assets like a bank account or retirement fund.
  - Print the last four digits of any account you own. Print the name and address of the institution holding the asset, like the name and address of the bank where your money is. Check the names on the account if you own it with someone else. List the current balance. Contact the institution or plan administrator if you need to confirm the current value of the asset.
  - If money is owed to you, print the amount owed.
  - If you have cash, print the amount you have.
  - If you have “term” life insurance (for example, if the policy pays money to your beneficiaries only upon your death), then print the “face” value of the policy. The “face” value is the amount the policy will pay to your beneficiaries upon your death. If you own “whole” life insurance that has a cash value if you cash the policy while you are alive, then print the amount you would receive if you cashed the policy. Also provide the policy’s face value. Leave blank any sections that do not apply to you. Attach supporting documents like recent statements.
  - Report and describe any other monetary asset you might own.
- Paragraph (10): Report any debts you owe to others. Include amounts you owe on credit cards, any loans that you did not list in paragraphs 7 and 8, and any other bills you owe. Identify the creditor (the person or company you owe the money to), the purpose of the debt (for example, emergency medical expenses for your child), who is responsible for the debt, the amount owed, and the amount of monthly payments you make. If you make payment amounts that change from month to month, calculate the annual total and divide by 12 months to list a monthly amount. Attach supporting documents like payment statements.
- Paragraph (11): Print the amount for any monthly expenses that you have and leave blank any expenses that you do not have. If the expense varies from month to month, calculate the annual total and divide by 12 months and print the monthly amount. Be precise as you can and avoid making estimates.
  - Food and household supplies means food purchased and also non-grocery items such as household cleaning supplies and toiletries.
  - Alimony and child support includes amounts you pay based on a prior court order not related to the current case.

- Entertainment includes activities you and your children engage in like going to the movies.
  - Education includes tuition, books, school supplies, and school fees. List separately the education expenses you pay for yourself and the education expenses you pay for your children.
  - Expenses for your children's extra-curricular activities may include such things as music lessons, sport team costs, camps, and scout costs.
  - Gifts include birthdays and holidays.
  - If you have other expenses, print the amount and briefly describe the expense.
  - Add the items listed and print the a total monthly amount.
- Paragraph (12): If you do not have payment statements, receipts, pay stubs, tax returns, or any method of proving an amount listed in the financial declaration, then you must provide an explanation of your method of estimating an amount listed. Print the paragraph number from where the required information appears in the form, the item you had to estimate, the amount you estimated, and the basis you used to make the estimate. If you did not have to estimate any amounts listed in the form, then leave this paragraph blank.
  - Paragraph (13): If you are not able to provide supporting documents to prove an item reported in the financial declaration, then print the item and explain briefly why you cannot provide that document. For example, if your most recent tax returns are in the opposing party's possession and you cannot obtain them, then explain this situation briefly.
  - Declaration and signature. This financial declaration is required by law and you must make this declaration truthfully.
  - Date and sign the form.
  - Attach any required documents and forms.
  - Serve the form and any attachments on the other party by one of the methods described in the certificate of service. URCP 5 governs service.

**(3) Complete the Certificate of Service.**

- File the certificate of service with the court. Normally the parties do not file the financial declaration and attachments with the court until the documents are needed. The documents will be needed before any trial or pretrial conference. They will also be needed if a party asks for a temporary order. You must serve amendments to the financial declaration if there is new information or if there are changes to the information.